



Natural Resources Conservation Service
Wallace F. Bennett Federal Building
125 South State Street, Room 4402
Salt Lake City, UT 84138-1100

August 15, 2008

UTAH BULLETIN UT330-08-04 - REVISED

SUBJECT: MGT - UTAH CONSERVATION PLANNING POLICY

Expiration Date: Until further notice.

Background: Policy on Toolkit customer file structure has not been implemented in Utah. Conservation plans should follow the structure outlined in the National Planning Procedures Handbook.

Purpose: To provide guidance on creating folders and files in Toolkit.

Guidelines for the Entry of Folders in Toolkit:

- **(REVOKED)** ~~In an effort to streamline and simplify the data entry and contracting reporting processes, a customer should only have one folder and one conservation plan entered in Toolkit.~~
- **(REVOKED)** ~~The customer Toolkit folder should contain one conservation plan but may have multiple Excel files as needed for all programs and years. Do not create separate "Consplans" for WHIP, WRP, or EQIP programs by year. The only exception to this would be CSP, in which case an additional customer folder with "CSP" in the file name can be added in Toolkit for the purpose of streamlining by means of merging field boundaries.~~
- **(REVOKED)** ~~Plans that have already been created do not need to be revised; this policy applies to all Toolkit conservation plans developed after March 1, 2008 and beyond.~~
- **(REVOKED)** ~~For existing Toolkit customer folders that already contain more than one non-CSP plan, choose one of the plans to serve as the core conservation plan and make subsequent additions and modifications to that plan. Toolkit SP-3 functionality now allows folders and plans to be re-named. This function may be used in order to clarify which plan has been selected as the core conservation plan for a given customer.~~

New Guidelines

- Due to issues with reporting "work preformed by" the field will be allowed to have multiple conservations plans entered into Toolkit for each customer folder.
- Plans will be named with the corresponding planning year (i.e. FY07Consplan, FY08Consplan, etc.). If multiple consplans are created for program usage the following naming will be used (FY08ConsplanEQIP, FY08ConsplanWHIP, FY08ConsplanGIP, etc.).

- If there is a ProTracts application associated with the contract the ProTracts Application number will be used as the “Contract Identifier” in Toolkit under the contract wizard.
- Offices will continue to use their standard naming conventions for the Toolkit Customer Folders (i.e. Identifier - Company/Business, Producer Name) when creating new folders.
- **Employees will not include any personal identifiable information (PII), in any of the naming conventions used in Toolkit.**

Contacts:

David Rose, Acting ASTC-Technology, at 801-524-4562 or David.Rose@ca.usda.gov

Customer Service Toolkit, ProTracts, and Progress Reporting System: James Huggard, State Technology Coordinator, (801) 524-4587 james.huggard@ut.usda.gov

Customer Service Toolkit / ArcMap: Ryan Pierce, GIS Specialist, (801) 524-4304
ryan.pierce@ut.usda.gov

SYLVIA A. GILLEN
State Conservationist

Distribution: E